The Electoral Costs of Party Loyalty in Congress

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To what extent is party loyalty a liability for incumbent legislators? Past research on legislative voting and elections suggests that voters punish members who are ideologically "out of step" with their districts. In seeking to move beyond the emphasis in the literature on the effects of ideological extremity on legislative vote share, we examine how partisan loyalty can adversely affect legislators' electoral fortunes. Specifically, we estimate the effects of each legislator's party unity—the tendency of a member to vote with his or her party on salient issues that divide the two major parties—on vote margin when running for reelection. Our results suggest that party loyalty on divisive votes can indeed be a liability for incumbent House members. In fact, we find that voters are not punishing elected representatives for being too ideological; they are punishing them for being too partisan.

In 2004, U.S. Representative Rob Simmons (R) was reelected to his eastern Connecticut congressional district with 54% of the vote even though voters in the district favored John Kerry over George W. Bush by a 10% margin. Simmons won his Democratic-leaning district with a combination of personal appeal (he had served as an Army intelligence officer) and a moderate voting record. Two years later, however, Simmons's opponent and the Democratic Congressional Campaign Committee criticized his voting record as being too loyally Republican for his district. Although Simmons's 2005 party unity score of 74% was relatively low when compared with most House Republicans, by the end of the campaign even a Republican who voted with the party 74% of the time was too much for the voters of eastern Connecticut; Simmons lost by 83 votes.[1] In the end, the only Republican reelected from Connecticut was Chris Shays, who eked out a 51%–48% win with a party unity score of 67%.

Simmons's defeat illustrates how party loyalty can have severe consequences for an incumbent seeking reelection. While it is possible that a single legislative vote will have such detrimental electoral effects, legislators also worry that a *pattern* of controversial roll-call votes may result in defeat during the subsequent election (Arnold 1990; Bovitz and Carson 2006). At the same time, legislators care about policy outcomes and may accept some electoral risk to pass a bill for the sake of personal preferences or their party's overall goals (Cox and McCubbins 2005). Thus, when studying voting behavior in Congress, it is important to recognize the effects of competing influences on votes. To date, these effects have been examined

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[1]This account of Simmons's defeat is drawn from "The Northeast: Some Prime Takeover Targets." *CQ Weekly Online* (April 24, 2006): 1088–89. Accessed November 7, 2007, at http://iiiprxy.library.miami.edu: 2346/cqweekly/weeklyreport109–000002161511; and Kady II, Martin. "Party Unity: Learning to Stick Together." *CQ Weekly Online* (January 9, 2006): 92–95. Accessed November 7, 2007, at http://iiiprxy.library.miami.edu: 2346/cqweekly/weeklyreport109–000002027054. As of December 23, 2009, a DCCC ad against Simmons can be seen at http://www.youtube.com/watch?v=DMFOptPBB7k and a Joe Courtney ad against Simmons can be seen at http://www.youtube.com/watch?v=toyD3fnwG4I.

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in a limited setting or in the context of a single election cycle, but we lack a systematic examination of the electoral consequences of loyalty to one's party on contested issues.

To what extent do voters punish members of Congress for a record of voting against constituency interests? Are legislators penalized for voting too often with their parties or are they more likely to be punished for ideological extremity? In this article, we seek to address these important questions by examining the electoral consequences of party unity on divisive roll-call votes in the U.S. House of Representatives. Previous work has emphasized the importance of *ideological* extremity in affecting vote share for incumbents and suggested this relationship is constant across all districts (see, e.g., Canes-Wrone et al. 2002; Erikson 1971). We contend, however, that ideological preferences are not *directly* related to electoral outcomes. Instead, revealed ideology (measured with NOMINATE scores) is antecedent to the more important factor of loyalty to one's party as reflected by party unity (voting with a majority of members of one's party on issues dividing the political parties).[2] In our account, ideology is one of several factors influencing party unity in voting, and incumbents' vote share tends to decrease as their party unity increases. Instead of this effect being constant across districts, we expect the partisan makeup of constituencies to play a part in determining these effects.

Further, party loyalty is not exogenous to legislators' reelection prospects. Party leaders on both sides of the aisle expend considerable effort to increase the unity of their party but simultaneously attempt to limit the electoral costs of doing so. Thus, while they may twist members' arms to win a key vote, they carefully choose which arms to twist. Party leaders will be more likely to ask legislators in "safe" seats to take risks on behalf of the team since safe members can afford to lose a modest amount of support from their constituents. In this way, leaders can anticipate future elections as they apply pressure within their caucuses. This implies that we should observe reciprocal causality, with voters responding to a legislator's party unity when casting their ballots and party leaders anticipating voters' sanctions when they ask members to support the partisan cause. We model this strategic interaction in our empirical analysis of the electoral effects of party unity.

[2]We recognize there are limitations of using party unity scores in analyses of legislative behavior, especially in terms of measuring how much influence parties exert over member actions independent of preferences (see, e.g., Krehbiel 1993). Since we are interested in understanding the electoral consequences of party unity on a subset of divisive roll-call votes and *not* trying to measure party influence on these roll calls, however, we do not view this limitation as adversely affecting the scope of our analysis.

Next, we review prior research examining the relationship between roll-call behavior and electoral effects to illustrate how our view of electoral accountability has evolved. From there, we turn our attention to the linkages between these factors and argue why higher party unity may have a conditional effect on legislators' reelection. We then present our empirical results, which consist of an experiment highlighting the individual-level mechanisms at work and analyses of the determinants of incumbent vote share in the House from 1956 to 2004. Lastly, we review the implications of our findings for electoral accountability and representation in Congress.

Evidence from the Literature

In a democratic system of government, few issues are more important than accountability and representation. In his classic work examining the electoral connection in Congress, Mayhew (1974) maintains that incumbents are extremely sensitive to the potential electoral implications of their votes, and as a result, behave strategically when announcing a position on a roll-call vote. When required to reveal a position on a controversial or highly contested vote, Mayhew argues that those members who are the "safest" will be more likely to vote with the leadership, while those who are not will take the politically expedient position, all else equal. If legislators are strategic and good at anticipating voters' responses, they might never cast a vote that costs them electoral support. However, "mistakes" on roll calls may occur, or legislators may respond to peer pressure and requests from party leaders by voting with their party more often than they may like. In such cases we should observe that legislators who are viewed as being "out of touch" by their constituents will be punished in an upcoming election.

Many studies of congressional behavior examine the effects of ideological extremity on electoral outcomes. Using electoral and survey data from 1952 to 1968, Erikson (1971) found that conservatism among Republican legislators had a pronounced, negative effect on their vote margins. In his study of voting behavior in Congress, Kingdon (1989) concludes that members act strategically when casting roll-call votes and are careful to avoid expressing positions that may be viewed as too "extreme" by constituents. This is true, Fenno (1978, 142) suggests, even though most votes are not visible; legislators do not know *ex ante* which votes will be important to their constituents or attacked by challengers, so they must act as if *every* vote is potential campaign fodder. More recently, Ansolabehere et al. (2001) and Erikson and Wright (2001)

found that candidates' vote share is inversely related to ideologically extreme voting.

In one of the most comprehensive and related analyses to date, Canes-Wrone, Brady, and Cogan (2002) examine the relationship between members' electoral margins and their overall ideological support as reflected by ADA scores and demonstrate that legislators are indeed held accountable for their roll-call behavior. Using data from the 1956–96 elections, they find that incumbent legislators tend to receive smaller electoral margins as their ADA scores become more extreme. Moreover, they illustrate that this effect is comparable to other determinants of electoral margins, including challenger quality and campaign spending. Finally, they contend that the distinction between "safe" and "marginal" representatives is tenuous at best, since this phenomenon affects all members equally, regardless of their previous electoral performance.[3]

The implicit mechanism in research on electoral effects of ideological extremism is that voters disapprove of incumbents whose policy views are inconsistent with their own (see, e.g., Miller and Stokes 1963). In the long run, representatives who vote like staunch liberals or conservatives will find it difficult to be reelected unless most of their constituents share their strong views, or unless they moderate their voting behavior. Given perfect information about their constituents, it is not clear why any ambitious legislator would lose for being too extreme. Ideologically extreme members could restrict their "extremism" to issues their constituents care little about or do not monitor closely. We need some explanation, therefore, for why legislators (many of whom are risk-averse when it comes to voting against their constituents) would cast a pattern of votes that is "out of step" with voters.

One explanation for legislators' casting electorally risky votes is that they are members of parties which induce them to cast risky votes for the collective interests of the party. More recent work examines the relationship between election outcomes and party loyalty to determine whether partisan cooperation is a liability for legislators. Carson (2005), for instance, examines the voting patterns of legislators on key votes since the early 1970s and finds that experienced candidates are more likely to run as an incumbent's party unity score increases on these highly visible roll calls. This suggests that legislators' high levels of partisan loyalty on salient votes often diverge from constituent interests, especially when those interests differ from the policy goals of the party leaders. As such, strong challengers are more likely to run against incumbents who have high party unity scores on key votes since such behavior can be framed as being out of touch with their constituents—especially if the legislators represent more moderate districts.

In a recent article, Lebo, McGlynn, and Koger (2007) propose a model of "strategic party government" and investigate the relationship between aggregate party behavior in Congress and electoral outcomes over time. They test their model on macrolevel data from 1789 to 2000 and find that an increase in party unity on voting has adverse electoral costs for both parties during this time period. Although these findings do not speak to the presence of microlevel effects, they do raise a number of questions for students of representation and electoral accountability. Is there a connection between party loyalty on divisive votes and how well incumbents perform at the polls? To what extent do constituents hold legislators accountable for party unity above and beyond ideological extremity? If the effects of party unity at the macrolevel are indeed present, when and under what conditions might we expect these same effects to show up at the microlevel? It is to these questions that we turn our attention in the remainder of the article.

Linking Electoral Accountability and Party Loyalty Theoretically

The literature on congressional elections suggests that members seeking reelection often have several distinct advantages. They typically can raise money and outspend their opponents, they have better name recognition, and they can run on their accomplishments as legislators (Jacobson 2009). Legislators also use party affiliation as a "brand name," which offers benefits or liabilities as they seek reelection (Cox and McCubbins 2007). More specifically, the benefits incumbents provide for constituents stem from serving as a member of one of the two parties, and advantages accruing to majority party members in particular are a function of the agenda-setting opportunities and powers that majority status entails (Cox and McCubbins 2005; Finocchiaro and Rohde 2008; Monroe and Robinson 2008; Rohde 1991).

Of course, electoral considerations represent only one of several possible determinants of congressional voting (Kingdon 1989). Legislators may have *personal policy views* that conflict with their constituents' preferences. As Bianco, Spence, and Wilkerson note,

> . . .to say that an electoral connection exists does not imply that a legislator will invariably comply

[3]See Bovitz and Carson (2006) for related evidence of electoral accountability in conjunction with legislative voting on individual roll calls in the U.S. House and Bonney, Canes-Wrone, and Minozzi (2007) for similar evidence with respect to crime policy in Congress.

> with constituent demands. A legislator who has intense policy concerns may decide to risk reelection by voting against constituents in order to promote a preferred policy. (1996, 151)

When a member's policy-driven votes reflect a general approach to policy issues, we can label that *ideology* and evaluate whether a member is too liberal or conservative for her district. On the other hand, party leaders may ask legislators to support the party's position on controversial and tightly contested issues that might be difficult to explain in their home districts. This is most likely when the party position is inconsistent with, or unrelated to, the representative's ideology. If a legislator is pulled in multiple directions by competing electoral and policy considerations, she must often make a tough choice on a roll call, especially since it remains to be seen whether that position will prove consequential in the upcoming election.

What happens when legislators face contradictory pressures from their constituents and party leaders? If elected from a district that largely overlaps with the underlying preferences of the party, legislators have little need to worry that supporting the party on highly visible or closely contested votes will adversely affect their reelection chances. When the preferences of their constituency do not overlap with those of their political party, however, then their electoral status becomes more uncertain. These *cross-pressured* members may be called upon to make tough choices on important votes in Congress. If they vote with the party on controversial or highly salient issues, they risk alienating their political base in the next election. But, if they repeatedly vote in line with their district and against the party, then they may lose favor with the party leadership and risk sanctions (Cox and McCubbins 2005). Regardless of their choice, they increase the risk of isolating one of their two core bases of support.

The preceding discussion raises an important question for students of legislative politics: What exactly is the type of behavior most likely to upset voters? To be sure, an overall pattern of legislative voting that is viewed as too dissimilar from constituent interests can result in a premature departure from Congress. As noted above, many prior studies have sought to explain the effects of roll-call voting on election results in terms of the underlying ideology of votes cast by a legislator. Yet, what we know about the individual psychology of voters tells us that voters neither understand ideological concepts like liberalism and conservatism very well nor do they have an easy time placing events in theoretical terms like ideology (see, e.g., Converse 1964; Sniderman, Brody, and Tetlock 1991, 95–96, 188).

Perhaps more central to voters in congressional elections are concepts of *partisanship*. Voters may be much more comfortable identifying themselves as Democrats or Republicans than they are as liberals or conservatives (Bartels 2000; Campbell et al. 1960; Converse 1964; Kinder 1998). If so, they would have a much stronger reaction to political actions taken by a legislator classified in terms of the legislator's partisan opposition than his or her ideological opposition. Since "members of Congress are far less familiar than the president to most voters, it is easy to accept the proposition that party identification is a far more important determinant of congressional than of presidential voting" (Mann and Wolfinger 1980, 619). In the current era of highly polarized politics, ingroup/outgroup dynamics may be more prevalent with respect to Democrats versus Republicans than to liberals versus conservatives. If partisan considerations motivate citizens' voting decisions, legislators may pay steep electoral costs for a pattern of extreme party loyalty.

If voters place greater weight on partisanship than on ideology when evaluating behavior in Congress, then past research has largely mischaracterized the connection between roll-call voting and citizen evaluation. Many studies have used roll calls to understand congressional structure and behavior but have mostly framed these votes in ideological terms. While ideology and partisanship are closely related—that is, ideology can predict partisanship—it is perhaps the latter concept, and not the former, that is the more direct cause of electoral outcomes.[4] If so, the partisan nature of roll calls should help us understand how voters hold legislators accountable.

How do voters become aware of excess partisanship by their elected representatives? While most roll calls remain outside of the electoral arena, studies of legislative behavior suggest that incumbents are risk-averse and worry about their votes because they suspect some roll calls *may* become electorally salient (Arnold 1990; Bianco, Spence, and Wilkerson 1996; Fiorina 1974; Mayhew 1974), and they can never be absolutely certain which roll calls will figure prominently in the next election. In fact, the more divisive or salient the roll call, the more likely it is to generate attention from outside interests, especially if the overall pattern of legislative voting is perceived as being too far out of touch with district sentiment (Carson 2005; Jacobson 2009; Mann and Wolfinger 1980).

Arnold (1990, 46) argues that legislators must be careful when casting roll calls because citizens may use any

[4] In one of the few studies that have systematically examined the electoral effects of both ideological and partisan extremity, Erikson (1971) found that the effects of both factors are very similar in terms of electoral accountability.

number of the incumbents' actions as cues when engaging in retrospective voting. Incumbents must also establish voting records that seek to dissuade challengers from exposing inconsistencies. "The fear is not simply that citizens will notice on their own when a legislator errs, but that challengers will investigate fully a legislator's voting record and then share their interpretations of how he or she has gone wrong" (Arnold 1990, 272–73). Indeed, "a prominent position on the wrong side of a major issue [can]. . .galvanize potential opponents" (Jacobson 1987, 139). Wright (1978, 446) maintains that it is not necessary for issues to account for much variance in election outcomes since electorally insecure legislators only require token incentives to take note of the policy interests of their constituents. He also suggests that "since the candidate's issue stance is one of the few factors relevant to his reelection that is also within his control, the representative is well advised to bring his issue positions into line with those of his constituency. Not to do so could be the determining factor in electoral defeat" (459).

Media coverage surrounding salient votes in Congress suggests that legislators have sufficient reason to worry about their roll calls being politicized. Media coverage of showdown votes in Congress can expose "attentive publics" (Arnold 1990, 64–65) to an incumbent's roll-call choices. As a result, those individuals most capable of exploiting legislators' voting records for political advantage—prospective candidates, political activists, and social elites—have ample opportunities to become aware of roll-call votes and transform them into electorally salient political issues. This, in turn, can be sufficient for the roll call to have an impact at the polls.[5] It is even more likely that party unity votes will attract considerable media attention given that a majority of members in both parties are taking opposing sides on the issues under consideration.

Whenever possible, the party leadership attempts to make roll-call voting decisions as easy as it can for its members on most legislation that comes before Congress. While the majority party wants to win, it frequently does not need its entire membership to fall in line to do so. Moreover, the party leadership is preoccupied with maintaining its majority status, and doing so occasionally requires placating representatives who represent cross-pressured districts (Arnold 1990). In order to maximize the likelihood the party will win while simultaneously minimizing its loss of seats, the party leadership must be strategic in choosing when to pressure members on controversial legislation. Thus, when the party leadership finds it has more votes than necessary to pass a bill (or realizes it does not have enough votes to win), it will release extraneous, cross-pressured members to vote with their constituencies.[6] These legislators might otherwise find it difficult to support the party position on controversial legislation (Cox and McCubbins 2007; Desposato and Petrocik 2003; King and Zeckhauser 2003; Mayhew 1974).

At other times, i.e., when an upcoming vote becomes critical to the collective reputation of a party, the political stakes may be too high to allow cross-pressured members to defect on important legislative issues. Party leaders may be more reluctant to allow a member to defect if it is on a procedural issue, as this is where we should expect to see the majority party attempting to structure the legislative agenda (Cox and McCubbins 2005; Cox and Poole 2002; Jenkins, Crespin, and Carson 2005; Theriault 2008). Party loyalty in voting can thus become a campaign issue in two distinct ways: a challenger can criticize an incumbent's overall pattern of voting ("Smith votes in lockstep with her party") or specific votes on which an incumbent joined with his or her party ("Smith sided with her party bosses on the minimum wage").

This article explores the extent to which elected representatives are held accountable for loyalty to their political party. When the stakes are high, and policy outcomes are at risk, the majority party leadership has a lot riding on the final outcome.[7] In such cases, party leaders may place greater pressure on rank-and-file members to support the party's position. In other words, there is reason to suspect theoretically that the degree of party pressure placed on legislators may be *conditional* upon a variety of circumstances as well as the specific electoral prospects of the legislators asked to support the political party. Drawing upon legislative voting behavior since the 1950s, we move beyond prior work that has focused exclusively on ideological extremity and examine whether party unity

[5] As Fiorina asserts, "an informed, issue conscious citizenry (in the best traditions of democratic theory) may not be crucially important for representative government. The entire district need not be watching, just some part of it—a potential challenger, newspaper editor, interest group, or lone, informed citizen. Nor need they be watching at the time of the vote; just so they dig up the dirt before the election" (1974, 123).

[6] Griffin (2006) finds that elected officials who represent competitive House districts tend to be more responsive to their constituents' preferences.

[7] This is not meant to suggest, however, that minority party leaders fail to recognize the importance of these types of votes. Indeed, minority party leaders often try to maintain high levels of party cohesion on the off chance they can pick off a few members of the majority and "roll" them in the process (Cox and McCubbins 2005). Failing that, they may seek to force as many majority members as possible to cast votes that can be used against them in the next election.

directly affects incumbent electoral success in the U.S. House given the theoretical linkages outlined above.

One thing that is missing from studies of congressional elections is an understanding of how voters reward or punish legislative behavior. Many studies (e.g., Canes-Wrone et al. 2002) implicitly assume that voters punish legislators when their records are seen as ideologically extreme. But, since voters tend to think more easily in partisan terms than in ideological terms (Kinder 1998; Sniderman et al. 1991), this is a point where our understanding of congressional elections is at odds with extant research on voting behavior. Moreover, even if voters identified themselves as strongly within ideological groups as they do within partisan groups, they may be more forgiving of ideological extremism than they are of excessive partisanship. For example, voters may view an ideologically extreme legislator as principled, while they may consider a legislator who consistently votes with her party as a "party hack."

In light of this disconnect between studies of legislative and voting behavior, our article offers us an opportunity to test four distinct claims about the relationship between voting in Congress and election outcomes. First, an ideologically extreme voting pattern on roll calls may cause incumbents' reelection margins to decrease as voters punish these politicians for their divergent behavior. Second, voters punish legislators who are overly partisan in their voting on divisive issues on the House floor. Third, both partisanship and ideological extremity may be important factors in predicting how well incumbents do at the polls. Finally, we may simply observe no discernible relationship between congressional voting and congressional elections, which would cast doubt on some recent scholarly evidence on this issue. In the next section, we offer some experimental evidence to illustrate more clearly the linkage between party loyalty and individual voting behavior in congressional races. Following that, we present analyses of 7,939 congressional races over the 1956–2004 period.

Experimental Evidence

We designed an experiment[8] to determine whether individual voters punish legislators more severely for lockstep partisanship than for ideological extremism. Each participant was first provided with bland information about a fictional member of the U.S. House—name, marital status, number of children, profession prior to election to public office, and charitable works. We gave our subjects just enough information so that we could measure their initial propensity to support the incumbent for reelection, "despite having very little to go on." This initial level of support was recorded on a 7-point scale ranging from strong support to strong opposition.

Next, participants were exposed to a list of 10 policy positions taken by the incumbents. It was explained to participants that roll-call votes could be characterized either in partisan terms where the parties were split on the issue—voting "with the Republicans and against the Democrats"—or in ideological terms—as rated by Americans for Democratic Action (ADA). Each participant was exposed to one "partisan-characterized" and one "ideology-characterized" incumbent. That is, one incumbent's 10 roll-call votes were characterized as votes with one party and against the other. The other incumbent's 10 roll-call votes were characterized by their reported ADA rating as being on either the liberal or the conservative side of the issue. The 10 issues were chosen to balance fiscal, moral, and military and foreign policy issues.

A participant would see an incumbent who had voted with one particular party either 6, 7, 8, 9, or 10 out of 10 times, and an incumbent who had voted with one particular ideology 6, 7, 8, 9, or 10 out of 10 times. This created variance in how partisan or how ideologically extreme the incumbent might be. After viewing each incumbent's 10 positions, the participant answered between three and five distracter questions (for the purposes of allowing the participant to forget *exactly* how many times the politician had voted with one party or ideology and to retain only a vague impression of the politician's partisanship or ideological extremity). Finally, the participant indicated his post-exposure propensity to support the incumbent and answered a number of questions about his impressions of the candidate.

The main dependent variable for this analysis, then, is the difference between the pre- and the post-exposure level of electoral support. The main explanatory variable is the amount of lockstep partisanship or ideological extremity of the legislator. This variable was dichotomized so that a participant's exposure to a legislator voting with one side 6 or 7 out of 10 times was coded 0 and exposure to a legislator voting with one side 8, 9, or 10 out of 10 times was coded 1. We believe this dichotomous coding reflects the likelihood that the differences between, say, a 9-out-of-10 and a 10-out-of-10 politician may not seem so large to a voter. Instead, voters more generally may see politicians as being predictably one-sided or less so.

[8]For a more detailed discussion of our sample, experimental procedures, and results, see our online appendix at http://ms.cc.sunysb.edu/~mlebo/details.htm.

We include in our analysis a single control variable: the extent to which the voter's party identification or ideological self-identification (measured on a 7-point scale) opposes the incumbent's party. In other words, if the incumbent votes more often with the Republicans and the participant is a strong Republican (7 on the 7-point scale), the participant is scored 1 on this variable, indicating that the voter and the legislator match. If the incumbent votes more often with the Democrats, this same voter would be scored a 7, indicating a strong mismatch. This variable was recoded to range from 0 to 1, with 0 a voter-incumbent match and 1 a voter-incumbent mismatch. This covariate controls for the tendency of voters to evaluate incumbents' partisanship or ideology from their own perspective. We also want to minimize the possibility that our findings are the result of the characteristics of our participants rather than the fictional incumbents we presented to them.

The primary means, however, of minimizing this possibility was thorough randomization. Randomized aspects of the experimental design were (1) whether the participant saw the partisanship-characterized or the ideology-characterized legislator first; (2) the order in which the 10 issues were presented; (3) whether the legislator leaned Republican or Democratic, liberal or conservative; (4) how many times out of 10 the incumbent voted with his preferred party or ideology; and (5) on which issues the incumbent voted with his preferred as opposed to his less-often-preferred party or ideology. Because of the randomization, it is difficult to argue that our results are biased by certain issues appearing systematically earlier in the experiment, or participants making the vote decisions based on specific "hot-button" issues.

We first administered the experiment to a sample of students ($N = 143$) at a northeastern university. The results are shown in the first two columns of Table 1, where we report results from seemingly unrelated regressions. The SUR model allows the creation of a single covariance matrix of coefficients for the purposes of comparing coefficient sizes between the partisan-incumbent and the ideological-incumbent equations. When the dependent variable is the change in support after seeing the incumbent's positions characterized as partisan, partisan lockstep voting has a significant negative effect on support for the legislator. Extreme legislators suffer a decline of 0.64 scale-points (on the 7-point scale) for being lockstep or near-lockstep roll-call voters over and above the expected penalty (2.67 points) exacted when the voter's party identification changes from maximally for to maximally against the legislator's preferred party.

On the other hand, while there is still a penalty (1.20 points) for a legislator's preferred ideological position being opposite the participant's ideological self-ID, the effect of ideological extremity is nonsignificant and *positive*. A post-SUR Wald test shows that the coefficients for partisan and ideological extremity are significantly different from each other ($p = .003$): partisan lockstep voting yields electoral sanctions (and is, indeed, the only kind of extremity which brings punishment at all) while ideological extremity does not.

One potential concern with this finding is that it could be unique to the northeast. In other regions of the country, such as the more conservative south, the word *liberal* and, perhaps even the word *conservative*, might be more toxic than in the northeast. To answer this challenge, we gathered an additional nonstudent "adult" sample nearly balanced between 50 adults from a southern capital city and 54 subjects from an area within approximately 30 miles of the northeastern university for our experimental analyses. The results are shown in the next two columns of Table 1. The inclusion of southerners as half of the adult sample leaves the results unchanged. As before, there is a significant negative effect of partisan lockstep voting on electoral support, there is a nonsignificant positive effect of ideological extremity, and, again, the difference between the two coefficients is significant.[9]

That an incumbent's partisan lockstep voting damages electoral support at the individual level, while ideological extremity does not, appears to be a robust finding regardless of how the sample is divided. Combining the student and adult samples and then partitioning by various demographic and other variables, the coefficient for partisan lockstep voting was between -0.5 and -1.0 and significant at $p < .05$ (one-tailed test) whether we look only at liberals or conservatives, only Republicans or Democrats, only higher- or lower-educated, only male or only female, only strongly religious or only less so, only in the upper or only in the lower half of incomes,[10] or only the more or only the less politically knowledgeable. Also, for every one of these subsamples, the coefficient for ideological extremity was positive.

[9]The southern-only results are not shown, but they mainly follow the results of Table 1 while offering no support whatsoever to the counterhypothesis that southerners might punish ideological extremity more than they punish partisan lockstepping; the coefficient for partisan lockstep voting is -0.52, negative as in the case of the full adult sample and the student sample, but with a p-value of only 0.12 in a one-tailed test. The coefficient for ideological extremity is, as in the full adult and the student samples, positive but curiously *larger* in contradiction to the southern counterhypothesis: $\beta = 0.87$, $p = .057$ two-tailed. Again, the Wald test reveals the two coefficients are significantly different from each other.

[10]One exception here: the coefficient for partisan lockstep voting is absolutely larger at -1.22 for the higher incomes in the adult sample ($p = 0.04$), the only sample for which income was asked.

TABLE 1 Seemingly Unrelated Regressions (SUR) of Change in Support for Legislator*

	Northern Student Sample		Adult Sample	
Dependent variable: change in support before/ after seeing legislator's positions in partisan terms	Coefficient (std. err.)	p-value (2-tailed)	Coefficient (std. err.)	p-value (2-tailed)
Independent variables				
Legislator was very partisan	−0.64*	0.007	−0.83*	0.016
	(0.24)		(0.34)	
Voter's party ID opposite of legislator	−2.67*	0.000	−1.94*	0.000
	(0.33)		(0.44)	
Constant	1.18*	0.000	0.65	0.051
	(0.26)		(0.33)	
Dep. var.: change in support before/after seeing legislator's positions in ideological terms				
Independent variables				
Legislator was ideologically extreme	0.39	0.123	0.22	0.516
	(0.25)		(0.34)	
Voter's ideological ID opposite of legislator	−1.20*	0.002	−2.95*	0.000
	(0.42)		(0.46)	
Constant	0.05	0.862	0.96	0.009
	(0.29)		(0.37)	
Wald test of H_0: effect of hyper-partisanship = effect of ideological extremity	$\chi^2 = 8.8$, p = .003		$\chi^2 = 4.61$, p = 0.032	
N	137		104	

*After seeing 10 policy positions characterized in either partisan or ideological terms.

In sum, the results are unambiguous: when an incumbent is known to have voted with one particular party a great majority of the time, voters of various demographic stripes withdraw electoral support. When an incumbent's roll calls are known to have supported one particular ideology all or almost all of the time, voters do not appear to exact electoral punishment for this fact alone, and can even reward such behavior, although they do not do so reliably. In all cases, members of Congress (MCs) with a record of lockstep partisanship incur a significant loss of electoral support.

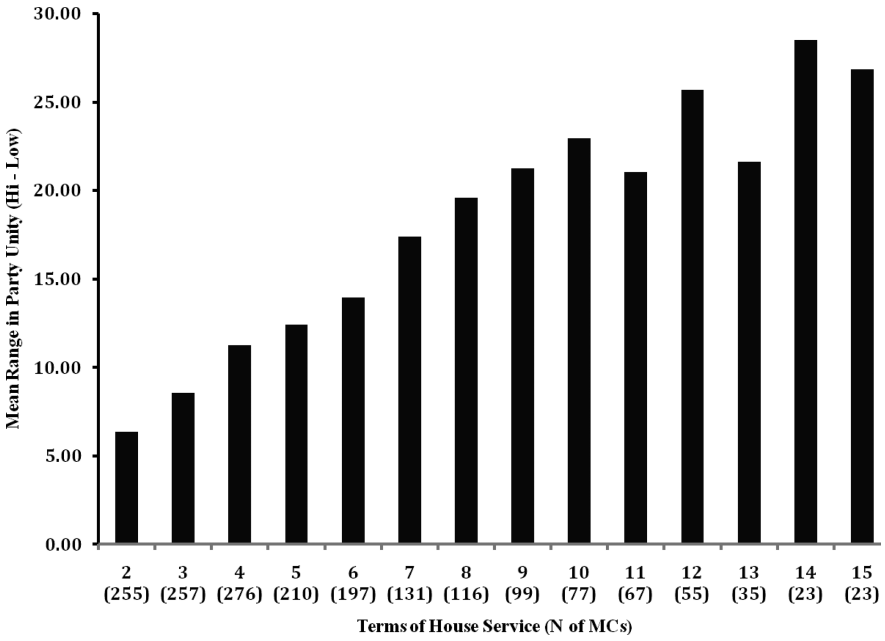
Party Unity in House Elections, 1956–2004

Next, we seek to explain electoral success for members of the House running for reelection from 1956 to 2004. Consistent with Jacobson (1996), the dependent variable is the percent of incumbent *i*'s two-party vote share; following Canes-Wrone et al. (2002) this varies by year *t*. Since there are many races in which incumbents ran unopposed or faced only token opposition, we examine only those races in which a major party challenger received at least 1,000 votes. The mean vote share for incumbents is 64.8% with a standard deviation of 9.8.

The independent variable we are most interested in for our analysis is the level of party unity for the incumbent legislator. *Party Unity* scores for individual representatives were collected from *Congressional Quarterly Almanac* from 1955 to 2004. *CQ* first identifies every "party" vote that pits a majority of one party's members against a majority of the opposing party, then calculates for each legislator the percentage of these party votes on which the member voted with his or her party. For some years, *CQ* counted absences against one's unity score, while for other years it did not. We recode the data so that absences do not count for or against one's score. As the proportion of times a member votes with her party, unity is scored from 0 to 1, with an actual minimum of 0.039 for Larry McDonald's (D-GA) voting in the 95th Congress.[11]

[11]What kind of representative votes with his party less than 4% of the time? Serving as a Democrat from Georgia's 7th district from 1975 to 1983, McDonald once said, "We have four boxes with which to defend our freedom: the soap box, the ballot box, the jury box, and the cartridge box." He also became the president of the John Birch Society while serving in the House. McDonald was aboard Korean Air Flight KAL-007, shot down by the Soviets in 1983, thus becoming the only U.S. member of Congress killed by the Soviet Union during the Cold War. Or, "knowingly" killed by the Soviet Union, as the John Birch Society might report.

FIGURE 1 Average Range in House Members' Party Unity Score by Terms of Service



We note that this variable provides three forms of variation: individual legislators change their unity over time, the unity of legislators varies within a Congress, and there is variation as a district changes its representative over time. Even if every member of Congress had a constant rate of party unity throughout his or her career, this would still give us a great deal of leverage to make inferences about different levels of party unity. But, of course, there is much more variation than this over the course of a legislator's career. We summarize the difference between a legislator's highest and lowest party unity score across his or her career and present these ranges, aggregated by the number of terms served, in Figure 1. The longer a member's career, the greater the average difference between high and low party unity scores, with legislators serving 18+ years varying (on average) 20% or more. Even at the low end, though, legislators who serve two terms change (on average) 5%. So even if we focus on within-legislator variation, there is a great deal to explain.

Next, we view ideological extremism as a determinant of party unity and measure it using first-dimension DW-NOMINATE scores (Poole and Rosenthal 2007), which assess legislators' voting tendencies on the traditional liberal-conservative economic dimension. These scores reflect measures of revealed ideology relative to other legislators in Congress. More specifically, they are derived using an item-response model to estimate the number of substantive dimensions in legislative voting and each legislator's ideal point on these dimensions. A single dimension typically explains most of the variance in congressional voting, so we use first-dimension DW-NOMINATE scores. We calculated the absolute value of these scores so that high values of the variable *Ideological Extremism* indicate that a member has an "extreme" voting record, while low values suggest that a member's preferences are at odds with the mainstream of her party.

To isolate the effects of representatives' roll-call behavior on their electoral fortunes, we control for a variety of factors that have previously been shown to affect incumbents' electoral performance, including prior electoral success, the partisanship of the district, challenger quality, incumbent and challenger spending (in years where available), freshman status, presidential approval, the change in real disposable personal income, and in-party versus out-party status. We explain our operationalization of each below.

Incumbent Vote, our measure of electoral security, is the incumbent's percentage share of the vote in the previous election. Since we are only interested in incumbents running for reelection, there is no loss of cases by including a lagged variable.[12]

District partisanship is measured as the share of the two-party vote that the presidential candidate of the

[12]Given concerns about the consequences to inference of including a lagged endogenous variable (Achen 2000), this variable does not appear in all of our models.

incumbent's party received in the congressional district in the most recent presidential election. Presidential vote at the district level is typically employed as a measure of district preferences and can be a useful proxy for evaluating the degree to which legislators who support the party on controversial votes are cross-pressured by constituents (Jacobson 2009).

Challenger quality is coded 1 if the candidate previously held elected office, 0 otherwise. This coding also follows Jacobson's (1980) classic study that views having run a successful elective campaign as a proxy for candidate quality.[13] *Spending Gap* is included to control for the effects of incumbent and challenger spending, following Jacobson's work on money in elections. It is calculated as the natural logarithm of challenger expenditures minus the natural logarithm of incumbent expenditures.[14] Since spending data are not available prior to 1978, using them requires leaving out elections from 1956 to 1976. Thus, we test our hypotheses using both our full historical period of data and, separately, our full complement of variables for 1978 to 2004.

Freshman is a dummy variable controlling for freshman status among incumbent legislators. *In Party* is a dummy variable that measures whether legislators are members of the president's party. *Midterm* accounts for the effects of midterm elections and is scored "1" for midterm elections with a president of the legislator's party, "−1" with a president of the opposite party, and "0" in presidential election years. *Presidential Approval* and *Change in Personal Income* are also coded for in-party status so that a popular president and growth in income levels are expected to help members of the president's party and hurt those in the out-party.[15]

To examine our expectations systematically, we use a generalized two-stage least-squares panel data estimator with fixed effects and instrumental variables (Baltagi 2005).[16] The use of single-stage pooled regression models is common in the congressional elections literature (see, e.g., Canes-Wrone, Brady, and Cogan 2002; Jacobson 1993), yet it would be preferable to incorporate the efforts of legislators to anticipate the effects of their legislative behavior on electoral outcomes. Instead, a two-stage modeling strategy has two distinct advantages over single-stage estimation techniques. First, party unity is itself an endogenous variable that is affected by, and affects, a legislator's electoral vote margin. Party leaders use their expectations about upcoming elections to decide which legislators' arms will be twisted in terms of higher levels of unity. Since we also expect constituents to react to levels of party unity, this results in reciprocal causality and makes a two-stage approach appropriate for estimation purposes.[17]

Endogeneity is also a problem due to the effects other independent variables in the model have on Unity. Thus, a second advantage of our two-stage approach is that it accounts for the plausible effects on Unity that Freshman status, District Partisanship, and Approval likely have.

A third advantage of our estimation strategy is that it gives us the opportunity to evaluate whether revealed legislator preferences are an *antecedent* variable in the relationships between members' actions and their electoral fortunes. That is, we expect that revealed preferences are a reasonably good predictor of unity but are not by themselves a predictor of vote share—voters are more likely to punish legislators for being too partisan rather than simply being too ideological. When we use party unity as an endogenous variable and revealed preferences as an instrument in a first-stage equation, our instrument tests can tell us whether preferences predict unity, but not incumbent vote share. If preferences are not a good instrument, they belong in the second-stage equation as a direct predictor of incumbent vote share. This is one of the major differences between our analyses and those of Canes-Wrone et al. (2002), who omit what we view as the proximate predictor from their equations—party unity—and use revealed preferences instead. Just to be thorough,

[13]See Gary C. Jacobson, *Money in Congressional Elections* (1980), 106–7. For an alternative view on how to measure challenger quality, see Green and Krasno (1988).

[14]As Jacobson (1980) argues, the advantage of using the natural logarithm of campaign expenditures for analyses of elections is that doing so avoids the assumption of a linear relationship between money and votes, thus accounting for diminishing marginal returns from campaign spending. Data on presidential vote share, quality challengers, and campaign spending were generously provided by Gary Jacobson.

[15]Presidential approval is scored as the raw approval number minus 50% and multiplied by −1 for members not of the president's party. Change in real disposable income is taken from the third quarter of the election year and is multiplied by −1 for members of the out-party.

[16]We also estimated the models of Tables 2–6 using random effects models and random coefficient models. In every case, our findings were nearly identical. We present the fixed effects models due to their ease of interpretation—the coefficients are the within-year effects on the dependent variable due to a one-unit increase in the independent variable of interest. Note that low values of ρ in the tables indicate that the vast majority of unexplained variance is going on within years rather than between years, thus making the results of the various approaches quite similar.

[17]Our study is the first to apply a two-stage approach to electoral outcomes, but Canes-Wrone, Rabinovich, and Volden (2007) use a two-stage model to explain ideological extremity in legislative voting.

however, we rerun our models and present abbreviated results with voting extremity moved to the second stage, thus allowing us to evaluate its impact relative to unity.

In sum, then, we have the following basic model of representatives' electoral vote margins estimated as the second stage of our simultaneous equations model:

$$\begin{aligned} \textit{Incumbent Vote}_{it} &= \tau_{2t} + \gamma_1 \widehat{\textit{Unity}}_{it} + \beta_0 + \beta_1 \textit{District}_{it} \\ &+ \beta_2 \textit{Challenger}_{it} + \beta_3 \textit{SpendGap}_{it} + \beta_4 \textit{Freshman}_{it} \\ &+ \beta_5 \textit{InParty}_{it} + \beta_6 \textit{Midterm}_{it} + \beta_7 \textit{Approval}_{it} \\ &+ \beta_8 \Delta \textit{Income}_{it} + \beta_9 \textit{Incumbent Vote}_{it-1} + \nu_{it} \end{aligned}$$

where τ_{2t} is the year-specific effect, ν_{it} is the overall error component, β_0 is the estimated constant, $\beta_1 - \beta_9$ are regression coefficients, and γ_1 estimates the effect of predicted values of the endogenous variable $\widehat{\textit{Unity}}_{it}$, which is estimated in a first-stage equation:

$$\begin{aligned} \widehat{\textit{Unity}}_{it} &= \tau_{1t} + \delta_1 \textit{District}_{it} \\ &+ \delta_2 \textit{Challenger}_{it} + \delta_3 \textit{SpendGap}_{it} + \delta_4 \textit{Freshman}_{it} \\ &+ \delta_5 \textit{InParty}_{it} + \delta_6 \textit{Midterm}_{it} + \delta_7 \textit{Approval}_{it} \\ &+ \delta_8 \Delta \textit{Income}_{it} + \delta_9 \textit{IncumbentVote}_{it-1} \\ &+ \theta_1 \textit{Extremism}_{it} + \theta_2 \textit{Unity}_{it-1} \end{aligned}$$

In this equation, θ_1 and θ_2 estimate the effects of instrumental variables excluded from the second stage above and $Unity_{it-1}$ is the lagged value of party unity for legislator i, which serves as a useful instrument.[18] Also, τ_{1t} is the year-specific effect for the first-stage equation. To investigate our questions fully, we estimate several models that vary slightly from the above equations, but all maintain the same basic structure.[19]

Results

We begin by testing our central claims that incumbents experience a decrease in their share of the two-party vote as their party unity in Congress increases, and that legislators' party loyalty decreases when they are electorally vulnerable. We then test variations on our central argument by determining whether the relationship is stronger for vulnerable or secure legislators, we control for campaign finance spending, we explore interactive effects, and we look at a model that excludes southern representatives. Finally, we calculate our model using *change* in vote share as the dependent variable, thereby controlling for variables that are constant for each legislator (e.g., ideology).

Vote Share Declines with Party Unity

Table 2 estimates four slightly different versions of our basic model. Models 1 and 2 use our entire sample period but exclude the spending gap variable, and Models 1 and 3 exclude our control variable tapping electoral safety. All our independent variables perform as expected.

To begin, the character of the district is very important in predicting incumbent vote share. As a district becomes more supportive of presidential candidates from the legislator's party, the incumbent does better. Aspects of the individual race matter as well. Facing a quality challenger makes reelection more difficult, costing a legislator just over 5% of the vote share in Model 1 but less in the shorter period of data. This difference could well be due to the introduction of a spending gap variable in the later period (see Jacobson 2009). Indeed, the difference in the natural logs of incumbent and challenger spending is a powerful predictor of incumbent vote. Also, getting reelected as a freshman appears to have a significant impact on vote share, but the sign depends upon whether electoral security is included in the model.

National-level conditions are also important determinants of congressional races. As others have found, higher levels of presidential approval help legislators of the president's party and hurt members of the opposite party. Incumbents also benefit from sharing the president's party affiliation as personal income is growing. Consistent with regularized patterns of surge-and-decline in House races, midterm elections reduce vote share for members of the president's party, all else equal (Jacobson 2009).

The key result from the four models is that party unity has a significant negative impact on an incumbent's vote share. Over the 1956–2004 period, and holding all other variables constant, voters consistently punish legislators for voting too often with their party. In Model 1, a 50-point increase in a member's party unity score will cost an incumbent nearly 5% of the vote share in the subsequent election—*a loss equal to that of a quality challenger entering the race*.[20] When we also factor in the effect of electoral security in Model 2, the size of the party unity effect is diminished but it is still statistically significant. Over the

[18] However, this costs us cases, including all of 1956 when looking at the complete time period.

[19] To use data beginning in 1956, *SpendGap* is left out of Models 1 and 2 of Table 2 and Model 1 of Table 5. To compare our models when not accounting for electoral security, $\textit{Incumbent Vote}_{it-1}$ is left out of both equations in Models 1 and 3 of Table 2. Throughout, we aid identification problems by having at least two instrumental variables that are not correlated with the errors of the second stage (see Wooldridge 2002, 90).

[20] Also note that this is a "typical" effect, so actual effects may vary with factors like seat marginality, campaign intensity, and the depth of party loyalty in a district's votes.

TABLE 2 Explaining House Incumbents' Share of the Two-Party Vote, 1956–2004[†]

	1956–2004				1978–2004			
	Model 1		Model 2		Model 3		Model 4	
	Coef. (s.e.)	*z*	Coef. (s.e.)	*z*	Coef. (s.e.)	*z*	Coef. (s.e.)	*z*
Constant	50.23 (0.68)	74.36***	24.90 (0.83)	30.12***	47.87 (0.82)	58.18***	30.01 (0.99)	30.43***
Voteshare_{t-1}			0.48 (0.01)	44.84***			0.36 (0.01)	29.39***
District Partisanship	43.90 (0.98)	44.79***	23.17 (0.99)	23.33***	37.60 (1.09)	34.42***	23.21 (1.13)	20.59***
Quality Challenger	−5.20 (0.23)	−22.20***	−3.25 (0.21)	−15.54***	−3.07 (0.28)	−11.08***	−2.07 (0.26)	−8.05***
Spendgap					−2.83 (0.08)	−37.02***	−2.25 (0.07)	−30.04***
Freshman	−2.74 (0.33)	−8.29***	1.72 (0.31)	5.59***	−0.94 (0.35)	−2.67**	0.93 (0.33)	2.78**
Presidential Approval (coded by in-party)	0.07 (0.01)	6.29***	0.15 (0.01)	14.59***	0.06 (0.01)	4.83***	0.12 (0.01)	9.44***
Midterm Election (coded by in-party)	−4.05 (0.20)	−20.20***	−5.00 (0.18)	−28.02***	−2.54 (0.28)	−9.21***	−3.34 (0.26)	−12.88***
Δ Personal Income (coded by in-party)	−0.43 (0.04)	−10.53***	−0.41 (0.04)	−11.48***	0.03 (0.06)	0.44	−0.10 (0.06)	−1.71*
In-party	0.61 (0.21)	2.95**	2.00 (0.19)	10.78***	−0.26 (0.31)	−0.86	1.03 (0.29)	3.50***
Party Unity[††]	−9.55 (0.82)	−11.66***	−4.15 (0.75)	−5.50***	−9.19 (0.98)	−9.33***	−5.85 (0.92)	−6.34***
R^2 within/between/all	0.36 / 0.10 / 0.35		0.52 / 0.60 / 0.53		0.55 / 0.14 / 0.52		0.64 / 0.24 / 0.62	
ρ	.060		.037		.094		.086	
Observations	6669		6031		3967		3519	
Groups	24		24		14		14	
Obs/Group Min/Avg/Max	120 / 277.9 / 316		104 / 251.3 / 293		249 / 283.4 / 310		228 / 251.4 / 272	
Instruments excluded from second stage	Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}	
F-test of Excluded IVs (*p*)	7768 (0.00)		6800 (0.00)		5596 (0.00)		4849 (0.00)	
Sargan χ^2 statistic (*p*)	0.19 (0.66)		0.18 (0.67)		0.93 (0.36)		0.28 (0.60)	
Effect of Extremity on Unity – 1st Stage	$z = 41.02$ ***		$z = 41.22$***		$z = 34.61$***		$z = 33.17$***	
Rerunning Above but with	*Model 1b*[†††]		*Model 2b*[†††]		*Model 3b*[†††]		*Model 4b*[†††]	
Extremity in Second Stage	Coef. (s.e.)	*z*	Coef. (s.e.)	*z*	Coef. (s.e.)	*z*	Coef. (s.e.)	*z*
Party Unity[††]	−9.76 (1.37)	−7.13***	−3.97 (1.30)	−3.06***	−8.73 (1.76)	−4.97***	−8.27 (1.68)	−4.92***
Extremity	0.21 (1.10)	0.19	0.17 (1.01)	0.17	−0.42 (1.32)	−0.32	−0.68 (1.28)	−0.53

[†] Fixed effects panel-data models with instrumental variables and 2-SLS. The results of both random effects models and multilevel random coefficient models are nearly identical. [††]Instrumented variable. *p < .05, **p <.01, ***p < .001, one-tailed tests. [†††] Models are otherwise the same as above, but we show only the key results.

shorter period from 1978 to 2004, the variable is again significant and negative with or without the control for electoral security. On the whole, the models do quite well, with Model 2 (1956–2004) explaining 53% of the variance and Model 4 (1978–2004) explaining 62% of the variance in incumbent vote share.[21]

The finer points of our modeling strategy provide us with some additional insights into incumbent electoral performance. First, ideological extremity does not belong in a model predicting incumbent vote share. It does, however, prove to be a useful instrumental variable as a predictor of party unity, with z statistics of 41.02, 41.22, 34.61, and 33.17 in the first stage of the four respective models. Hansen-Sargan χ^2 tests indicate that extremity is properly excluded from the second-stage equation with p-values not dropping below .36. Additionally, the last two rows of Table 2 present abbreviated results when we move extremity from the first stage to the second stage.[22] Our instrument tests suggest that Models 1b-4b are misspecified, but they do allow extremity to predict vote share side-by-side with predicted values of party unity. Thus our empirical conclusions need not rest on one particular modeling strategy. Since extremity fails to approach statistical significance in any of these revised models, we gain confidence that it is an *indirect* predictor of incumbent vote share—voters appear to penalize a voting pattern of partisan loyalty by representatives, not the underlying ideology that may predict their voting record.[23]

Electoral Risk Predicts Party Unity

Additionally, our analysis finds reciprocal causality between incumbent vote and party unity. Like Lebo, McGlynn, and Koger (2007), we expect that parties attempt to win legislative contests while minimizing electoral costs. To do this, party leaders will be careful about whom they pressure to vote with the party, choosing legislators who are expected to do well in upcoming elections. In this way, predictions about future election outcomes condition levels of party unity. In Table 3 we show that this is indeed the case by switching the causal ordering of our earlier models. Here, we predict changes in the level of party unity from one Congress to the next. Predicted values of incumbent vote share in the election to follow are generated from a first-stage regression and are a strong positive predictor ($z = 3.99$) of levels of party unity in the second stage.[24] In addition, we can see some of the causal factors predicting changes in party unity. One interesting point is that legislators who are more extreme have a tendency to increase their level of unity from one Congress to the next once electoral safety is accounted for. That is, not only does extremity predict levels of party unity, but it also forecasts the inclination to increase the level of party unity controlling for an MC's chances for reelection.

Table 3 Explaining Change in Party Unity Using Future Incumbent Share, 1978–2004[†]

	Coef. (s.e.)	*Z*
Extremity	9.34 (0.89)	10.55***
Voteshare$_t$ [††]	0.09 (0.02)	3.99***
District Partisanship	−15.71 (1.61)	−9.73***
Midterm (by in-party)	−1.41 (0.27)	−5.23***
Δ In Party	−0.26 (0.12)	−2.12*
Constant	0.55 (1.23)	0.45
R^2	0.05	
Observations	3519	
Instruments excluded from second stage	Quality Challenger, Spendgap, Presidential Approval, Δ Personal Income, Voteshare$_{t-1}$, Freshman	
F-test of Excluded IVs (p)	475 (0.00)	
Sargan χ^2 statistic (p)	4.01 (0.55)	

[†] This is a pooled cross-sectional time-series model with instrumental variables and two-stage least squares. [††] Instrumented variable.
*p < .05, **p < .01, ***p < .001, one-tailed tests.

Close vs. Safe Districts

Returning to our predictions regarding vote share for incumbent legislators, we do not expect these relationships to stay the same regardless of the partisan landscape incumbents represent. The punishment constituents dole out for partisan behavior should be greatly reduced to the extent that the district leans toward the same party.

[21] Again, random effects models give very similar results to these fixed effects models and Hausman tests establish that there are no distinguishable differences in our coefficient estimates.

[22] For the complete results of these models, see our online appendix.

[23] This is also evident when we forgo our two-stage models and simply estimate the effects of ideological extremity and party unity together in a one-stage pooled regression model. In such cases, party unity is the superior predictor, with extremity failing to achieve statistical significance on its own. Note, however, that these models may suffer from the endogeneity bias that partially motivates our two-stage approach.

[24] Challenger quality, spending gap, lagged values of incumbent vote share, freshman status, change in income growth, and presidential approval are used as instruments excluded from the second stage of the estimation.

TABLE 4 Incumbent Share by Closeness of District†

	Pres. Vote < 40% 1978–2004		Pres. Vote < 50% 1978–2004		Pres. Vote < 65% 1978–2004		Pres. Vote > 65% 1978–2004	
	Coef. (s.e.)	***z***	**Coef. (s.e.)**	***z***	**Coef. (s.e.)**	***z***	**Coef. (s.e.)**	***z***
Constant	38.34 (4.62)	8.30***	39.36 (2.14)	18.37***	37.68 (1.24)	30.31***	9.39 (3.19)	2.94**
Voteshare_{t-1}	0.29 (0.05)	5.92***	0.28 (0.02)	11.77***	0.32 (0.02)	22.82***	0.35 (0.03)	13.11***
District Partisanship	23.00 (9.74)	2.36*	23.12 (3.78)	6.12***	13.48 (1.52)	8.89***	57.21 (3.98)	14.37***
Quality Challenger	−1.36 (0.76)	−1.76*	−1.53 (0.40)	−3.82***	−1.99 (0.27)	−7.50***	−3.04 (0.80)	−3.82***
Spendgap	−3.00 (.300)	−9.99***	−2.59 (0.13)	−19.22***	−2.40 (0.08)	−29.60***	−1.86 (0.16)	−11.29***
Freshman	2.13 (1.19)	1.78*	0.82 (0.56)	1.47	0.99 (0.36)	2.75**	0.05 (0.74)	0.07
Presidential Approval (coded by in-party)	−0.21 (0.10)	−2.15	0.13 (0.03)	4.40***	0.13 (0.01)	9.47***	0.14 (0.03)	4.57***
Midterm Election (coded by in-party)	2.84 (1.98)	1.43	−2.26 (0.57)	−3.92***	−3.48 (0.28)	−12.52***	−3.83 (0.73)	−5.23***
Δ Personal Income (coded by in-party)	0.87 (0.42)	2.05	−0.19 (0.14)	−1.30	−0.15 (0.07)	−2.27*	−0.51 (0.16)	−3.26*
In-party	−3.54 (2.16)	−1.64	1.51 (0.67)	2.26*	1.51 (0.32)	4.69***	2.41 (0.76)	3.19***
Party Unity††	−10.67 (2.99)	−3.57***	−10.06 (1.57)	−6.40***	−6.25 (0.94)	−6.67***	−7.27 (3.42)	−2.12***
R^2 within/between/all	0.55 / 0.17 / 0.42		0.52 / 0.20 / 0.49		0.53 / 0.14 / 0.51		0.70 / 0.39 / 0.68	
ρ	.367		.162		.096		.186	
Observations	268		1074		2857		662	
Groups	14		14		14		14	
Obs/Group Min/Avg/Max	5 / 19.1 / 55		37 / 76.7 / 115		187 / 204.1 / 230		23 / 47.3 / 77	
Instruments excluded from second stage	Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}	
F-test of Excluded IVs (p)	305 (0.00)		1185 (0.00)		2845 (0.00)		579 (0.00)	
Sargan χ^2 statistic (p)	1.72 (0.19)		0.03 (0.86)		0.02 (0.97)		0.27 (0.60)	
Effect of Extremity on Unity – 1st Stage	$z = 9.60$ ***		$z = 18.29$***		$z = 29.55$***		$z = 15.44$***	
Rerunning Above but with	*Model 1b*†††		*Model 2b*†††		*Model 3b*†††		*Model 4b*†††	
Extremity in Second Stage	Coef. (s.e.)	***z***	Coef. (s.e.)	***z***	Coef. (s.e.)	***z***	Coef. (s.e.)	***z***
Party Unity††	−21.16 (8.80)	−2.41**	−10.19 (3.07)	−3.32***	−4.71 (1.73)	−2.72**	−6.33 (6.17)	−1.03
Extremity	10.44 (8.21)	1.27	0.12 (2.54)	0.05	−1.45 (1.38)	−1.05	−0.51 (2.81)	−0.18

† Fixed effects panel-data models with instrumental variables and 2-SLS. The results of both random effects models and multilevel random coefficient models are nearly identical. ††Instrumented variable. *p < .05, **p < .01, ***p < .001, one-tailed tests. ††† Models are otherwise the same as above, but we show only the key results.

TABLE 5 Incumbent Share—Interactive Relationships and Non-Southern States[†]

	Model 1		Model 2		Model 3		Model 4	
	Interacting Partisanship & Unity, 1956–2004		Interacting Partisanship & Unity, 1978–2004		+ Other Interactions, 1956–2004		All Non-South, 1978–2004	
	Coef. (s.e.)	z	Coef. (s.e.)	z	Coef. (s.e.)	z	Coef. (s.e.)	z
Constant	49.36 (6.10)	8.09***	77.75 (9.24)	8.42***	79.64 (9.84)	8.10***	29.32 (1.12)	26.07***
Voteshare_{t-1}	0.49 (0.01)	37.98***	0.32 (0.01)	22.44***	0.33 (0.01)	22.37***	0.36 (0.01)	26.69***
District Partisanship	−22.58 (10.58)	−2.13*	−64.20 (16.04)	−4.00***	−69.41 (17.33)	−4.01***	23.62 (1.24)	19.03***
Quality Challenger	−3.19 (0.21)	−15.28***	−2.09 (0.26)	−8.13***	−2.07 (0.26)	−8.08***	−2.07 (0.27)	−7.30***
Spendgap			−2.29 (0.08)	−30.48***	−2.28 (0.08)	−30.37***	−2.18 (0.08)	−26.30***
Freshman	1.58 (0.31)	5.13***	0.73 (0.34)	2.17*	0.78 (0.33)	2.34**	1.07 (0.38)	2.85**
Presidential Approval (coded by in-party)	0.15 (0.01)	14.89***	0.12 (0.01)	9.96***	0.18 (0.08)	2.39**	0.12 (0.01)	8.70***
Midterm Election (coded by in-party)	−4.84 (0.18)	−26.77***	−3.34 (0.26)	−12.93***	−3.46 (0.26)	−13.29***	−3.12 (0.29)	−10.87***
Δ Personal Income (coded by in-party)	−0.39 (0.04)	−10.84***	−0.16 (0.06)	−2.53**	0.63 (0.21)	3.02**	−0.10 (0.07)	−1.43
In-party	1.92 (0.19)	10.34***	1.26 (0.29)	4.30***	1.40 (0.30)	4.70***	0.98 (0.33)	2.98**
Party Unity[††]	−32.02 (7.05)	−4.54***	−59.44 (10.47)	−5.68***	−61.72 (11.15)	−5.53***	−5.24 (1.04)	−5.02***
District Partisanship * Party Unity	54.61 (12.87)	4.24***	102.31 (18.99)	5.39***	108.20 (20.46)	5.29***		
Approval * Unity					−0.07 (0.09)	−0.73		
Δ P. Income * Unity					−0.95 (0.25)	−3.87***		
R^2 within/between/all	0.53 / 0.60 / 0.53		0.64 / 0.20 / 0.61		0.64 / 0.22 / 0.61		0.64 / 0.30 / 0.62	
ρ	.038		.104		.096		.087	
Observations / Groups	6031 / 24		3519 / 14		3519 / 14		2911 / 14	
Obs/Group Min/Avg/Max	104 / 251.3 / 293		228 / 251.4 / 272		228 / 251.4 / 272		179 / 207.9 / 225	
Instruments excluded from second stage	Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}		Extremity, Party Unity_{t-1}	
F-test of Excluded IVs (p)	391 (0.00)		212 (0.00)		192 (0.00)		4009 (0.00)	
Sargan χ^2 statistic (p)	1.95 (0.16)		1.46 (0.23)		0.02 (0.97)		0.10 (0.75)	
Effect of Extremity on Unity – 1st Stage	$z = 3.60$***		$z = 5.33$***		$z = 4.04$***		$z = 33.72$***	

[†] Fixed effects panel-data models with instrumental variables and 2-SLS. The results of both random effects models and multilevel random coefficient models are nearly identical.
[††]Instrumented variable. *p < .05, **p < .01, ***p < .001, one-tailed tests.

For example, we do not expect two districts—one heavily Democratic and one heavily Republican—to react in the same way to a member of Congress with a record of supporting the Democrats on a large percentage of votes. Table 4 shows the results when we look at four subsets of our 1978–2004 sample—cases where the most recent presidential candidate of the incumbent's party received less than 40% of the vote (n = 268), cases where he won less than 50% of the vote (n = 1,074), cases where he won less than 65% of the vote (n = 2,857), and cases where he won more than 65% of the vote (n = 662).[25] We see in Models 1 and 2 a strong punishment for unity when only a minority of a district voted for the incumbent's presidential candidate. As expected, the electoral effect of unity does vary significantly across districts. When cases between 50% and 65% are added to the sample, the coefficient for Unity drops significantly to −6.25. Thus, in more competitive districts, party unity is of far more importance to voters looking at the records of their incumbents.[26] To again ensure the soundness of our conclusions that unity directly affects Voteshare and that extremity is antecedent, we show abbreviated results for Models 1b–4b that move extremity to the first stage of our 2-SLS approach. Unity again matters and extremity is not statistically significant.[27]

District Partisanship and Campaign Finance

Table 5 adds some additional tests. The first model examines the difference between close and safe districts over our entire data period using an interaction term. This variable, District Partisanship * Party Unity, is positive and significant, indicating that the negative effects of unity are attenuated by higher partisan support in a legislator's district. In districts with extremely high levels of partisan support, higher levels of unity can actually help, since constituents expect higher degrees of partisan loyalty. This finding is consistent with our theoretical expectations that a legislator's support of the party on divisive votes will be conditional upon the underlying partisanship of the district. The second model of Table 5 examines the interactive nature of this relationship using the spending gap variable and the shortened time period. Here the interactive relationship gets even stronger. Looking at the extreme cases, going from the lowest level of unity to the highest in a district with no partisans would cost a legislator 64.20% of the vote; however, doing the same in a district with 100% partisans would increase a legislator's vote share by 38.11% (102.31–64.20).

To this conditional effect, we add two more in Model 3 to account for the varying effects of unity according to national-level conditions. The coefficient on Party Unity * Change in Personal Income tests the extent to which partisanship is harmful contingent upon the state of the economy. This interaction does not achieve statistical significance, but interacting unity with presidential approval does yield a significant result. This in turn tells us that higher levels of unity are more harmful as either the president of one's own party declines in popularity (e.g., Nancy Johnson, R-CT, in 2006) or as the president of the opposition party increases in popularity. While these effects are of modest interest, they do not change the essential results reported in the earlier models. Model 4 of Table 5 checks the possibility that our findings are driven by noncompetitive southern districts. While all of our models exclude cases where no challenger received more than 1,000 votes, here we exclude all cases from the 11 Confederate states. Once again the punishment for party voting is evident.

Explaining Change in Vote Share

Lastly, we use a dynamic-panel approach to test our expectations and present the results in Table 6. In this model, all variables are differenced so that we are explaining changes in vote share using changes in the independent variables. That is, we explain how much better/worse an incumbent did in each election as compared with how she did in the previous election. Independent variables also measure differences between elections. For example, Δ Presidential Approval measures how much more (or less) popular the president is in one election year as compared with the previous election year.

This strategy allows us to hold a great many things constant—such as immeasurable personality or district characteristics. *Most importantly, this method ensures that ideology, while omitted, is perfectly accounted for in the model.* Since each legislator's ideology is likely unchanging between successive Congresses, it should not have an effect on the change in vote share for successive elections.[28] The Party Unity coefficient tells us how much

[25]This follows the most liberal definition of safe versus contested districts, but the results hold when we set the dividing line at 55% and 60%.

[26]When an incumbent represents a safer district, party unity still matters, but it matters much less compared to legislators representing moderate and competitive districts.

[27]Consult our online appendix for complete results.

[28]The ideal points of legislators can change slightly between Congresses as a result of additional votes being added to the roll-call matrix (Poole and Rosenthal 2007). We thank an anonymous reviewer for mentioning this.

TABLE 6 Dynamic Model of House Incumbent Share, 1980–2004[†]

	Coefficient (s.e.)	*Z*
Constant	−2.15 (1.65)	−12.98***
Δ District Partisanship	23.10 (2.61)	8.86***
Δ Quality Challenger	−1.81 (0.33)	−5.46***
Δ Spending Gap	−2.86 (0.10)	−27.75***
Δ Presidential Approval (coded by in-party)	0.18 (0.01)	12.75***
Δ Midterm Election (coded by in-party)	−3.75 (0.30)	−12.38***
Δ Personal Income (coded by in-party)	−0.34 (0.09)	−3.76***
Δ In Party	2.19(0.40)	5.43***
Δ Party Unity[††]	−9.39 (3.68)	−2.55**
R^2 within/between/all	0.28 / 0.08 / 0.27	
P	.069	
Observations	3518	
Groups	13	
Obs. per Group min/avg/max	244 / 270.6 / 306	
Instruments excluded from second stage	Δ Extremity, Δ Freshman	
Anderson LR test	1330	
(*p*)	(0.00)	
Sargan χ^2 statistic	0.86	
(*p*)	(0.35)	

[†]These are fixed effects panel-data models with instrumental variables and two-stage least squares. The results of both a random effects model and a multilevel random coefficient model are nearly identical. [††] Instrumented variable.
*p < .05, **p < .01, ***p < .001, one-tailed tests.

better (or worse) a House member will do compared to his or her last reelection based on how much more (or less) partisan he or she was in the present Congress compared to the previous Congress. The coefficient of −9.39 indicates a considerable loss when so many other effects are held constant. Although this model estimates effects on legislators who have been elected at least twice before, voters can still dole out a hefty punishment for increases in the level of partisan voting regardless of how "safe" legislators perceive themselves to be.

Conclusion

This article began with a simple, yet important premise—constituents evaluate the voting records of their members of Congress, including their tendency to vote with their parties. While past research has focused almost exclusively on the relationship between legislative ideology and electoral outcomes, we argue that such an approach misses an important linkage in legislative-constituency dynamics. Voters may prefer an ideologically "extreme" legislator as their elected representative in many districts to mirror their own preferences. They may even accept members who are ideological "mavericks" by voting their own preferences as a matter of conscience. At the same time, representatives may be more likely to be punished if they are perceived as being too partisan in their voting behavior in Congress, especially in an era when extreme partisanship has a strong negative connotation (Jacobson 2000; McCarty, Poole, and Rosenthal 2006).

By focusing almost exclusively on the connection between ideological extremity and electoral accountability, we believe that past research has overlooked the role of party loyalty in congressional elections. As the literature on individual voting behavior shows, partisanship is a much more prevalent force in the minds of voters than is ideology when choosing between candidates (see, e.g., Kinder 1998). Ideological considerations may be important when choosing between different candidates running for president. However, this is less often the case with representatives since far less information is available to evaluate legislators on this dimension. Indeed, as Mann and Wolfinger (1980) have shown, voters are more likely to respond to partisan than ideological considerations when considering who to support for Congress at the polls.

Given the disconnect between studies of legislative and individual voting, we investigate the relationship between partisanship and electoral outcomes through experimental and empirical evidence. The results of the experiment are striking: when an incumbent is known to have voted with one party a great majority of the time, voters are less likely to support him or her. In contrast, patterns of extreme ideological voting among legislators do not yield significant negative effects in terms of electoral support. Regardless of the sample we surveyed, legislators with a record of lockstep, partisan voting were most likely to suffer electoral losses in the subsequent election. These results help explain our main finding: legislators pay an electoral price for party loyalty in legislative voting, but party unity is partially a function of legislators' strategic calculations. We show this through a dynamic analysis that allows for reciprocal causation and incorporates the indirect effect of legislators' policy preferences on incumbent vote share.

By focusing explicitly on the effects of party unity in Congress, we find that incumbent House members' vote share declines the more they vote with their own party on

issues that divide the two major parties. While ideological extremity is correlated with party unity, we find that it has little *direct* effect on vote share. Moreover, party unity is almost twice as costly for members from moderate districts compared to lopsided districts, as defined by presidential vote share. Taken together, our work suggests that many legislators face electoral penalties for voting too often with their parties on divisive issues that attract the attention of challengers and attentive constituents. Legislators nonetheless support their party positions (and pay the penalties) out of some combination of personal conviction and support for the collective interests of their parties.

We hope that our findings stimulate additional research on congressional elections and legislative behavior. For example, it is unclear whether legislators are more likely to be pilloried for a single "wrong" vote (on behalf of a party goal) or for a *pattern* of party unity. In practice, we observe both types of claims in campaign ads. It would be useful to know more about the mechanism by which legislative partisanship becomes a campaign issue, or how partisanship is incorporated into campaign themes (e.g., tying a local MC to an unpopular party leader, or as proof that the local MC is "out of touch" or has "gone Washington"). Finally, more evidence is needed to evaluate which voters are likely to be swayed by patterns of partisan behavior.

Furthermore, our findings may stimulate additional research on the strategies that parties use to mitigate the costs of loyalty. While it is well established that congressional parties strive to minimize their costs by manipulating the rules and agenda of their chamber, further research is needed to test whether "procedural partisanship" is less costly in electoral terms than patterns of party loyalty on policy issues. Even more important, however, is the need for further refinement that explains why legislators incur the costs of voting with their parties in the first place.

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